

## Professional Indemnity for Marketing Consultants

### Proposer Details

1. a. Name(s) of Firm(s):

Name	Date commenced

Website address

1. b. Address(es) – all addresses must be shown together with the Principal in charge of each location:

Address	Principal in charge

1. c. Please give the following details for all Partners/Directors/Principals of the Firm(s):

Name	Qualifications	Date qualified	Age	How long as a Partner/Director/Principal

2. a. Please state total number of:

Principals/Directors	<input type="text"/>	Trained Staff	<input type="text"/>
Qualified Staff	<input type="text"/>	Other	<input type="text"/>

2. b. Please state the name of any Professional body or Trade Association of which the proposer is a member:

Professional body	Trade Association

3. Please state gross turnover (£) in the columns provided for the last 5 complete financial years.

Year end	/	/	/	/	/
UK work					
USA/Canada					
Other overseas					
Total					



7. i. Do you work to a written specification which includes campaign details, deadlines, volumes and quality control specifications?      yes       no
- ii. Are these constantly updated with project amendments?      yes       no
- iii. Is sign off always obtained by the end client before going to print?      yes       no
- iv. If you are involved in SMS/Email marketing please confirm an opt in approach is always adhered to.      yes       no
8. Have you at any time undertaken any work where the 'end product' is situated outside the United Kingdom?      yes       no

If 'yes' please give the following details:

Country	Start date	Description	Total Contract Value	Approximate Completion Date	Services provided

9. a. Do you use a standard form of contract, agreement or letter of appointment?      yes       no
- If 'yes' please attach a copy.*
- b. Does the Firm or any Partner/Principal/Director act on behalf of, or undertake work for any Firm, Company or Organisation in which this Firm or any Partner/Principal/Director has a financial interest?      yes       no
- c. Does any Partner/Principal/Director perform an executive role on behalf of any such Firm, Company or Organisation?      yes       no

If 'yes' to a. b. or c. please provide details:


10. a. Has the Firm(s) sustained any loss through the fraud or dishonesty of any person?      yes       no

If 'yes' please provide details:


10. b. Is the Firm(s) aware of any allegation or occurrence of fraud or dishonesty at any time committed by any past or present Partner, Director or Employee?      yes       no

If 'yes' please give details and state the precautions taken to prevent reoccurrence:


11. Has any insurer ever cancelled, declined, refused to renew or required an increased rate or special conditions in respect of your own or your predecessor(s)'s firm(s)'s insurance?      yes       no

If 'yes' please give full details:


12. Do you currently buy professional indemnity Insurance?

yes  no

If 'yes' please provide the following details:

Renewal Date

Limit of Indemnity

Excess

Premium

Current Insurer


13. Please specify:

a. The limit(s) of indemnity you require quotations for:

£	£	£	£	£
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b. Please state the excess you are prepared to carry:

£	£	£	£	£
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14. Have any claims, whether successful or not been made against the Firm(s) or their predecessors in business or any of the present or former Partners, Principals or Directors?

yes  no

15. Is any Partner, Principal, Director or employee after inquiry, aware of any circumstance or occurrences which may give rise to a claim against the Firm(s) or their predecessors in business or any of the present or former Partners, Principals or Directors?

yes  no

If 'yes' to question 14 or 15 please provide full details:


#### Declaration

I/we declare that, after full enquiry, the contents of this proposal are true and that I/we have not misstated, omitted or suppressed any material fact or information. I/we agree that this proposal together with any other information supplied by me/us shall form the basis of any contract of insurance which may be effected. If there is any material alteration to the facts and information which I/we have provided or any new material matter arises before the completion of the contract of Insurance, I/we undertake to inform Underwriters.

Signature of Principal

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Date

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